



TAX RETURN CHECKLIST

Welcome to BeFinancial

To help us prepare your tax return, please refer to the following checklist and email through this information to info@befinancial.com.au as soon as possible prior to your appointment.

Full Name:	
Date of Birth:	
Tax File Number:	
Address:	
Postal Address:	
Email Address:	
Mobile Number:	

ITEMS REQUIRED

	Attached ✓
Prior year tax return	
INCOME	
PAYG Payment summary	
Summary of interest earned from bank accounts	
Dividend or managed fund income (copies of dividend and managed fund statements)	
DEDUCTIONS	
Motor vehicle travel (any km's travelled for work purposes. Travel to and from work not included unless carrying sensitive info or heavy equipment)	
Uniform/clothing with logo or protective clothing	
Internet – percentage of work related use	
Phone (home and mobile) – percentage of work related use	
Home office – hours spent using your home office per week	
Purchase of any computers, hard drive, iPad and accessories. Printing costs or any other expense items related to work	
Union fees	
Income protection	
Accountants fee from last year's tax return	
Donations made	
OTHER	
Private health insurance	

BANK ACCOUNT DETAILS – for tax refunds to be credited to

Banking Institution:	
Name of Account:	
BSB:	
Account Number:	

Should you have any queries about any of the above or any other general queries, please feel free to contact our office on 1300 699 161 or email info@befinancial.net.au.